Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

▶ **Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.**

▶ **Information about Form 990-PF and its instructions is at *www.irs.gov/form990pf*.**

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation
BURT FAMILY FOUNDATION INC

A Employer identification number
30-0633793

Number and street (or P O box number if mail is not delivered to street address)
5 SHORE ROAD

Room/suite

B Telephone number (see instructions)
(860) 439-0289

City or town, state or province, country, and ZIP or foreign postal code
WATERFORD, CT 06385

C If exemption application is pending, check here ▶ ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

H Check type of organization ☑ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)*▶$ 1,350,303

J Accounting method ☑ Cash ☐ Accrual ☐ Other (specify) ________ *(Part I, column (d) must be on cash basis.)*

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	6,638	6,638		
	4	Dividends and interest from securities	22,596	22,596		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	61,818			
	b	Gross sales price for all assets on line 6a 307,114				
	7	Capital gain net income (from Part IV, line 2)		95,680		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	91,052	124,914		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	4,100	0		0
	c	Other professional fees (attach schedule)	9,358	0		0
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	489	0		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	13,947	0		0
	25	Contributions, gifts, grants paid	39,000			39,000
	26	**Total expenses and disbursements.** Add lines 24 and 25	52,947	0		39,000
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	38,105			
	b	**Net investment income** (if negative, enter -0-)		124,914		
	c	**Adjusted net income** (if negative, enter -0-)				

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Line	Description	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1		Cash—non-interest-bearing	-2	-1	-1
	2		Savings and temporary cash investments	16,347	27,932	27,932
	3		Accounts receivable ▶ ___ Less allowance for doubtful accounts ▶ ___			
	4		Pledges receivable ▶ ___ Less allowance for doubtful accounts ▶ ___			
	5		Grants receivable			
	6		Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7		Other notes and loans receivable (attach schedule) ▶ ___ Less allowance for doubtful accounts ▶ ___			
	8		Inventories for sale or use			
	9		Prepaid expenses and deferred charges			
	10a		Investments—U S and state government obligations (attach schedule)			
	b		Investments—corporate stock (attach schedule)	1,088,396	1,114,915	1,322,372
	c		Investments—corporate bonds (attach schedule)			
	11		Investments—land, buildings, and equipment basis ▶ ___ Less accumulated depreciation (attach schedule) ▶ ___			
	12		Investments—mortgage loans			
	13		Investments—other (attach schedule)			
	14		Land, buildings, and equipment basis ▶ ___ Less accumulated depreciation (attach schedule) ▶ ___			
	15		Other assets (describe ▶ ___)			
	16		**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	1,104,741	1,142,846	1,350,303
Liabilities	17		Accounts payable and accrued expenses			
	18		Grants payable			
	19		Deferred revenue			
	20		Loans from officers, directors, trustees, and other disqualified persons			
	21		Mortgages and other notes payable (attach schedule)			
	22		Other liabilities (describe ▶ ___)			
	23		**Total liabilities** (add lines 17 through 22)	0	0	
Net Assets or Fund Balances			**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24		Unrestricted			
	25		Temporarily restricted			
	26		Permanently restricted			
			Foundations that do not follow SFAS 117, check here ▶ ☑ and complete lines 27 through 31.			
	27		Capital stock, trust principal, or current funds	0	0	
	28		Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29		Retained earnings, accumulated income, endowment, or other funds	1,104,741	1,142,846	
	30		**Total net assets or fund balances** (see page 17 of the instructions)	1,104,741	1,142,846	
	31		**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	1,104,741	1,142,846	

Part III **Analysis of Changes in Net Assets or Fund Balances**

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,104,741
2	Enter amount from Part I, line 27a	2	38,105
3	Other increases not included in line 2 (itemize) ▶ ___	3	0
4	Add lines 1, 2, and 3	4	1,142,846
5	Decreases not included in line 2 (itemize) ▶ ___	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,142,846

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table			
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	95,680
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	39,930	1,159,148	0 034448
2011	23,000	1,054,671	0 021808
2010			
2009			
2008			

2	**Total** of line 1, column (d).	2	0 056256
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years . . .	3	0 028128
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	1,090,036
5	Multiply line 4 by line 3.	5	30,661
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	1,249
7	Add lines 5 and 6.	7	31,910
8	Enter qualifying distributions from Part XII, line 4.	8	39,000

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ________ **(attach copy of letter if necessary–see instructions)**		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b	1	1,249
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	0
3	Add lines 1 and 2	3	1,249
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	1,249
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013 — 6a: 5,441		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	5,441
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	4,192
11	Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ 4,192 **Refunded** ▶	11	0

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? *If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*	1b		No
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ 0 **(2)** On foundation managers ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6		No
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶CT			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

Part VII-A Statements Regarding Activities *(continued)*

		Line	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶CYNTHIA BURT BEEBE Telephone no ▶(860) 439-0289

Located at ▶5 SHORE ROAD WATERFORD CT ZIP+4 ▶06385

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here . . . ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year . . . ▶ | 15 |

		Line	Yes	No
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
	See instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ▶			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

		Line	Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☑ No			
	If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2013 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?	**5b**		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
CYNTHIA BURT BEEBE 5 SHORE ROAD WATERFORD, CT 06385	PRESIDENT & TREASURER 10 00	0	0	0
GILLIAN VON NIEDA BEEBE 5 SHORE ROAD WATERFORD, CT 06385	VICE PRESIDENT 10 00	0	0	0
LAUREN ASHLEY BEEBE 5 SHORE ROAD WATERFORD, CT 06385	SECRETARY 10 00	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶ 0

Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** ***(continued)***

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		

Total number of others receiving over $50,000 for professional services . . . . ▶ 0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3 . . . . ▶	0

Part X **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	1,071,774
b	Average of monthly cash balances	1b	34,862
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	1,106,636
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	1,106,636
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	16,600
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,090,036
6	**Minimum investment return.** Enter 5% of line 5	6	54,502

Part XI **Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6			1	54,502
2a	Tax on investment income for 2013 from Part VI, line 5	2a	1,249		
b	Income tax for 2013 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	1,249
3	Distributable amount before adjustments Subtract line 2c from line 1			3	53,253
4	Recoveries of amounts treated as qualifying distributions			4	0
5	Add lines 3 and 4			5	53,253
6	Deduction from distributable amount (see instructions)			6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	53,253

Part XII **Qualifying Distributions** (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	39,000
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	39,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	1,249
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	37,751

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				53,253
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			38,769	
b Total for prior years 20___ , 20___ , 20___		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				
d From 2011.				
e From 2012. 38,769				
f Total of lines 3a through e.	38,769			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ $ 39,000				
a Applied to 2012, but not more than line 2a			38,769	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				231
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2013 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	38,769			38,769
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount —see instructions		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				14,253
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . .	0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				
c Excess from 2011. . . .				
d Excess from 2012. . . .				
e Excess from 2013. . . .				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling . . . . ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2013	**(b)** 2012	**(c)** 2011	**(d)** 2010	**(e) Total**
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon **a** "Assets" alternative test—enter **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .					
c "Support" alternative test—enter **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000) (See section 507(d)(2))

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ▶☑ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number of the person to whom applications should be addressed

b The form in which applications should be submitted and information and materials they should include

c Any submission deadlines

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				39,000
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	6,638	
4 Dividends and interest from securities. . . .			14	22,596	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	61,818	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .		0		91,052	0

13 Total. Add line 12, columns (b), (d), and (e). **13** 91,052

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash	1a(1)		No
(2) Other assets	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
(3) Rental of facilities, equipment, or other assets	1b(3)		No
(4) Reimbursement arrangements	1b(4)		No
(5) Loans or loan guarantees	1b(5)		No
(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☑ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

****** | 2014-07-31 | ******

Signature of officer or trustee | Date | Title

May the IRS discuss this return with the preparer shown below (see instr)? ☑ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed	PTIN
FRANK A ROWELLA JR CPA		2014-07-31	☑	P00117516
Firm's name ▶ REYNOLDS & ROWELLA LLP			Firm's EIN ▶ 06-1143555	
Firm's address ▶ 90 GROVE STREET RIDGEFIELD, CT 06877			Phone no (203) 438-0161	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
10SHRS QUALCOMM INC		2012-03-09	2013-02-04
20SHRS SCHLUMBERGER LTD		2012-06-01	2013-02-13
1SHRS APPLE INC		2012-05-17	2013-02-20
30SHRS VALERO ENERGY CORP		2012-11-09	2013-02-20
3SHRS APPLE INC		2012-06-01	2013-03-01
20SHRS OCCIDENTAL PETROLEUM CORP		2012-12-12	2013-03-06
20SHRS BROADCOM CORP		2012-09-27	2013-03-22
10SHRS SOUTHWESTERN ENERGY CO		2012-09-27	2013-03-22
30SHRS COMCAST CORP		2012-09-27	2013-03-26
10SHRS QUALCOMM INC		2012-11-19	2013-04-17
6SHRS IBM		2012-09-28	2013-04-19
4SHRS IBM		2013-03-13	2013-04-19
5SHRS IBM		2013-04-03	2013-04-19
30SHRS CENTERPOINT ENERGY INC		2012-09-25	2013-04-24
20SHRS EATON CORP PLC		2012-11-30	2013-04-24
10SHRS LILLY ELI & CO		2012-08-10	2013-04-24
2SHRS CST BRANDS INC		2013-04-24	2013-05-03
80SHRS LILLY ELI & CO		2012-08-10	2013-05-24
80SHRS MONDELEZ INTERNATIONAL		2012-10-10	2013-06-04
20SHRS COMCAST CORP CL		2012-06-27	2013-06-07
10SHRS VERIZON COMMUNICATIONS INC		2013-04-19	2013-06-07
20SHRS VERIZON COMMUNICATIONS		2013-04-19	2013-06-17
10SHRS COMCAST CORP		2012-06-27	2013-06-20
20SHRS VERIZON COMMUNICATIONS		2013-03-26	2013-07-10
10SHRS VERIZON COMMUNICATIONS INC		2013-04-19	2013-07-10
10SHRS VERIZON COMMUNICATIONS INC		2013-04-03	2013-07-23
40SHRS SANDISK CORP		2013-06-17	2013-07-29
30SHRS SANDISK CORP		2013-06-18	2013-07-29
10SHRS SANDISK CORP		2013-06-20	2013-07-29
20SHRS YAHOO INC		2013-02-07	2013-08-09

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
50SHRS YAHOO INC		2013-03-07	2013-08-09
3SHRS EQUINIX INC		2013-03-04	2013-08-14
5SHRS EQUINIX INC		2013-03-07	2013-08-14
13SHRS EQUINIX INC		2013-03-01	2013-08-15
1SHRS EQUINIX INC		2013-03-04	2013-08-15
4SHRS EQUINIX INC		2013-06-07	2013-08-15
5SHRS CHEVRON CORPORATION		2012-11-09	2013-09-16
12SHRS CHEVRON CORPORATION		2013-03-06	2013-09-16
10SHRS GLAXO SMITHKLINE PLC		2013-04-24	2013-09-16
30SHRS BROADCOM CORP		2012-09-27	2013-09-20
10SHRS SALESFORCE COM INC		2013-06-07	2013-09-20
70SHRS TAIWAN SEMICONDUCTOR MFG		2013-07-03	2013-09-20
30SHRS BROADCOM CORP		2012-10-09	2013-10-02
30SHRS BROADCOM CORP		2012-11-07	2013-10-02
30SHRS BROADCOM CORP		2013-07-23	2013-10-02
40SHRS CITRIX SYS INC		2013-07-10	2013-10-14
10SHRS CITRIX SYS INC		2013-07-29	2013-10-14
20SHRS YAHOO INC		2012-11-05	2013-10-24
20SHRS YAHOO INC		2013-02-07	2013-10-24
20SHRS GLAXOSMITHKLINE PLC		2013-02-04	2013-11-14
10SHRS VMWARE INC		2013-07-29	2013-11-26
10SHRS NATIONAL OILWELL VARCO INC		2013-09-16	2013-12-09
10SHRS VALERO ENERGY CORP		2013-04-24	2013-12-09
10SHRS OCCIDENTAL PETROLEUM CORP		2012-12-12	2013-12-12
10SHRS VALERO ENERGY CORP		2013-04-24	2013-12-12
10SHRS VALERO ENERGY CORP		2013-05-03	2013-12-12
10SHRS ADOBE SYSTEMS INC		2013-03-22	2013-12-16
11140SHRS ALCATEL-LUCENT		2013-12-19	2013-12-03
60SHRS GLAXO SMITHKLINE PLC		2013-02-04	2013-12-18
20SHRS GLAXOSMITHKLINE PLC		2013-03-14	2013-12-18

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
1643SHRS BNY MELLON INCOME STOCK		2013-03-15	2013-12-27
500SHRS NESTLE SA		2009-02-12	2013-01-02
150SHRS US BANCORP		2011-01-28	2013-01-17
15SHRS UNION PAC CORP		2011-01-28	2013-01-28
250SHRS NESTLE		2009-02-12	2013-02-01
20SHRS WALT DISNEY CO		2011-01-28	2013-02-01
30SHRS NXP SEMICONDUCTORS		2011-10-17	2013-02-04
150SHRS PFIZER INC		2011-10-17	2013-02-04
40SHRS EMC CORP MASS		2011-10-17	2013-02-07
60SHRS EMC CORP MASS		2011-10-17	2013-02-12
30SHRS HALLIBURTON CO		2011-01-28	2013-02-13
20SHRS SCHLUMBERGER LTD		2011-01-28	2013-02-13
30SHRS MARATHON OIL CORP		2012-01-27	2013-02-20
3SHRS APPLE INC		2012-01-27	2013-03-01
40SHRS TERADATA CORPORATION		2011-10-17	2013-03-01
30SHRS NXP SEMICONDUCTORS		2011-10-17	2013-03-04
10SHRS TERADATA CORPORATION		2011-01-28	2013-03-05
40SHRS TERADATA CORPORATION		2011-01-28	2013-03-07
20SHRS QUALCOMM INC		2012-03-09	2013-03-13
10SHRS ACTAVIS INC		2011-01-28	2013-03-14
70SHRS NXP SEMICONDUCTORS		2011-10-17	2013-04-03
30SHRS COCA COLA CO		2011-10-17	2013-04-04
40SHRS MEAD JOHNSON NUTRITION		2011-10-17	2013-04-04
50SHRS BB&T CORPORATION		2011-04-26	2013-04-15
50SHRS BB&T CORPORATION		2011-10-17	2013-04-15
20SHRS BB&T CORPORATION		2011-11-08	2013-04-15
10SHRS INTERNATIONAL BUSINESS MACHINES CORP		2009-02-12	2013-04-19
5SHRS INTERNATIONAL BUSINESS MACHINES		2012-03-06	2013-04-19
3SHRS INTERNATIONAL BUSINESS MACHINES		2012-03-15	2013-04-19
6SHRS IBM		2009-02-12	2013-04-23

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
5SHRS AIR PRODS & CHEMS INC		2011-01-28	2013-04-24
30SHRS AIR PRODS & CHEMS INC		2011-10-17	2013-04-24
10SHRS QUALCOMM INC		2011-11-30	2013-04-25
10SHRS QUALCOMM INC		2012-02-10	2013-04-25
1SHRS CST BRANDS INC		2011-01-28	2013-05-03
11SHRS CST BRANDS INC		2011-10-17	2013-05-03
30SHRS GILEAD SCIENCES INC		2011-10-20	2013-05-13
1SHRS CST BRANDS INC		2011-10-17	2013-05-22
20SHRS PFIZER INC		2011-01-28	2013-05-24
40SHRS PFIZER INC		2011-10-17	2013-05-24
5SHRS APPLE INC		2011-10-17	2013-06-17
20SHRS QUALCOMM INC		2011-11-30	2013-06-17
20SHRS COMCAST CORP CL		2012-05-01	2013-06-20
50SHRS CARNIVAL CORP		2011-01-28	2013-06-21
70SHRS CARNIVAL CORP		2011-10-17	2013-06-21
1SHRS APPLE INC		2011-01-28	2013-06-26
5SHRS APPLE INC		2011-10-17	2013-06-26
469SHRS HIGHBRIDGE DYNAMIC COMM STRAT		2011-04-18	2013-07-03
6SHRS MALLINCKRODT PLC		2011-01-28	2013-07-02
4SHRS MALLINCKRODT PLC		2011-10-17	2013-07-02
30SHRS WALT DISNEY CO		2011-01-28	2013-07-02
30SHRS QUALCOMM INC		2011-11-22	2013-07-03
20SHRS ACCENTURE PLC		2011-10-17	2013-07-10
7SHRS IBM		2009-02-12	2013-07-19
10SHRS VERIZON COMMUNICATIONS INC		2011-10-17	2013-07-23
10SHRS PNC FINANCIAL SERVICES GROUP		2011-01-28	2013-07-25
20SHRS PNC FINANCIAL SERVICES GROUP		2012-07-19	2013-07-25
15SHRS PNC FINANCIAL SERVICES CORP		2011-01-28	2013-07-30
5SHRS PNC FINANCIAL SERVICES		2011-06-20	2013-07-30
10SHRS PNC FINANCIAL SERVICES GROUP		2011-06-20	2013-07-31

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo , day, yr)	**(d)** Date sold (mo , day, yr)
30SHRS HOME DEPOT INC		2011-01-28	2013-08-16
30SHRS WALT DISNEY CO		2011-10-17	2013-08-16
10SHRS EXXON MOBIL CORP		2011-10-17	2013-08-23
10SHRS HALLIBURTON CO		2011-01-28	2013-08-23
20SHRS HOME DEPOT CO		2011-01-28	2013-08-23
9SHRS ACTAVIS INC		2011-01-28	2013-09-16
1SHRS CHEVRON CORPORATION		2011-10-17	2013-09-16
10SHRS EXPRESS SCRIPTS HOLDING CO		2011-10-28	2013-09-16
30SHRS EXPRESS SCRIPTS HOLDING		2012-06-04	2013-09-16
30SHRS GILEAD SCIENCES INC		2011-10-20	2013-09-16
20SHRS BROADCOM CORP		2012-09-27	2013-10-01
20SHRS BROADCOM CORP		2012-09-27	2013-10-02
595SHRS BNY MELLON CORP BOND		2012-10-01	2013-10-07
13SHRS IBM		2009-02-12	2013-10-17
20SHRS COVIDIEN DLC		2011-01-28	2013-10-22
10SHRS ACCENTURE PLC		2011-10-17	2013-10-24
20SHRS SALESFORCE COM INC		2012-03-01	2013-10-24
500SHRS NESTLE SA		2009-02-12	2013-10-25
7SHRS SHIRE PLC		2011-10-17	2013-11-05
36SHRS ALLEGION PLC		2012-02-16	2013-12-03
1SHRS ALLEGION PLC		2012-02-16	2013-12-09
60SHRS THE TRAVELERSC COMPANIES INC		2012-07-19	2013-12-09
10SHRS VALERO ENERGY CORP		2011-01-28	2013-12-12
30SHRS OCCIDENTAL PETROLEUM CORP		2012-12-12	2013-12-16
30SHRS COVIDIEN PLC		2011-01-28	2013-12-20
30SHRS COVIDIEN PLC		2011-10-17	2013-12-23
CAPITAL GAINS DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	**(f)** Depreciation allowed (or allowable)	**(g)** Cost or other basis plus expense of sale	**(h)** Gain or (loss) (e) plus (f) minus (g)
659		642	17
1,569		1,541	28
452		536	-84
1,355		890	465
1,294		1,380	-86
1,633		1,531	102
685		704	-19
377		349	28
1,244		943	301
642		623	19
1,144		1,244	-100
763		849	-86
954		1,068	-114
725		642	83
1,169		1,033	136
564		436	128
66		73	-7
4,324		3,490	834
2,355		2,189	166
819		623	196
499		520	-21
1,011		1,041	-30
391		312	79
1,015		991	24
507		520	-13
503		489	14
2,221		2,451	-230
1,666		1,877	-211
555		610	-55
549		404	145

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	**(f)** Depreciation allowed (or allowable)	**(g)** Cost or other basis plus expense of sale	**(h)** Gain or (loss) (e) plus (f) minus (g)
1,374		1,139	235
518		638	-120
863		1,079	-216
2,147		2,761	-614
165		213	-48
661		770	-109
621		531	90
1,491		1,420	71
512		515	-3
827		1,056	-229
530		393	137
1,214		1,271	-57
791		998	-207
791		933	-142
791		963	-172
2,343		2,602	-259
586		686	-100
662		347	315
662		404	258
1,041		911	130
814		826	-12
803		788	15
464		384	80
912		765	147
462		384	78
462		380	82
588		430	158
189			189
3,055		2,733	322
1,018		905	113

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	**(f)** Depreciation allowed (or allowable)	**(g)** Cost or other basis plus expense of sale	**(h)** Gain or (loss) (e) plus (f) minus (g)
15,000		13,094	1,906
33,080		16,135	16,945
4,933		3,752	1,181
1,993		1,407	586
17,650		8,068	9,582
1,092		778	314
889		521	368
4,089		2,835	1,254
984		918	66
1,469		1,376	93
1,223		1,313	-90
1,569		1,584	-15
1,041		941	100
1,294		1,365	-71
2,348		2,338	10
949		521	428
590		429	161
2,299		1,716	583
1,335		1,284	51
913		537	376
1,923		1,215	708
1,210		1,015	195
3,027		2,973	54
1,520		1,301	219
1,520		1,103	417
608		481	127
1,907		937	970
954		990	-36
572		618	-46
1,152		562	590

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	**(f)** Depreciation allowed (or allowable)	**(g)** Cost or other basis plus expense of sale	**(h)** Gain or (loss) (e) plus (f) minus (g)
428		429	-1
2,569		2,513	56
624		548	76
624		618	6
33		22	11
317		194	123
1,629		610	1,019
15		8	7
580		365	215
1,161		756	405
2,161		2,117	44
1,238		1,097	141
781		614	167
1,664		2,246	-582
2,329		2,345	-16
397		336	61
1,987		2,117	-130
5,659		10,000	-4,341
272		214	58
163		123	40
1,901		1,166	735
1,829		1,642	187
1,485		1,151	334
1,363		656	707
503		373	130
760		604	156
1,519		1,240	279
1,134		906	228
378		284	94
763		569	194

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
2,270		1,104	1,166
1,870		1,018	852
872		776	96
485		438	47
1,469		736	733
1,230		483	747
124		100	24
658		466	192
1,975		1,528	447
1,884		610	1,274
528		704	-176
527		704	-177
7,500		7,762	-262
2,265		1,047	1,218
1,281		863	418
735		576	159
1,084		724	360
36,730		16,135	20,595
959		670	289
1,547		894	653
27		17	10
5,308		3,819	1,489
462		231	231
2,732		2,296	436
2,012		1,295	717
2,007		1,242	765
24,107			24,107

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			17
			28
			-84
			465
			-86
			102
			-19
			28
			301
			19
			-100
			-86
			-114
			83
			136
			128
			-7
			834
			166
			196
			-21
			-30
			79
			24
			-13
			14
			-230
			-211
			-55
			145

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			235
			-120
			-216
			-614
			-48
			-109
			90
			71
			-3
			-229
			137
			-57
			-207
			-142
			-172
			-259
			-100
			315
			258
			130
			-12
			15
			80
			147
			78
			82
			158
			189
			322
			113

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			1,906
			16,945
			1,181
			586
			9,582
			314
			368
			1,254
			66
			93
			-90
			-15
			100
			-71
			10
			428
			161
			583
			51
			376
			708
			195
			54
			219
			417
			127
			970
			-36
			-46
			590

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			-1
			56
			76
			6
			11
			123
			1,019
			7
			215
			405
			44
			141
			167
			-582
			-16
			61
			-130
			-4,341
			58
			40
			735
			187
			334
			707
			130
			156
			279
			228
			94
			194

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			1,166
			852
			96
			47
			733
			747
			24
			192
			447
			1,274
			-176
			-177
			-262
			1,218
			418
			159
			360
			20,595
			289
			653
			10
			1,489
			231
			436
			717
			765
			24,107

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
A PLACE CALLED HOPE 254 ROAST MEAT HILL ROAD KILLINGWORTH, CT 06419	NONE	501(C)(3)	GENERAL PURPOSES	2,000
ANIMAL LEAGUE DEFENSE FUND 170 EAST COTATI AVENUE COTATI, CA 94931	NONE	501(C)(3)	GENERAL PURPOSES	1,000
ANIMAL SHELTER OF WOOD RIVER VALLEY 100 CROY CREEK ROAD HAILEY, ID 83333	NONE	501(C)(3)	GENERAL PURPOSES	2,000
BAT CONSERVATION INTERNATIONAL PO BOX 162603 AUSTIN, TX 78716	NONE	501(C)(3)	GENERAL PURPOSES	2,000
BEECH BROOK FARM EQUINE RESCUE 125 FISHTOWN ROAD MYSTIC, CT 06355	NONE	501(C)(3)	GENERAL PURPOSES	2,000
BLOCK ISLAND CONSERVANCY 234 WELDONS WAY BLOCK ISLAND, RI 02807	NONE	501(C)(3)	GENERAL PURPOSES	1,000
BLUE RIDGE BULL TERRIER CLUB INC 4401 MANOR HALL LANE FAIRFAX, VA 22033	NONE	501(C)(3)	GENERAL PURPOSES	1,000
BORN FREE USA PO BOX 32160 WASHINGTON, DC 20007	NONE	501(C)(3)	GENERAL PURPOSES	1,000
CAVALIER KING CHARLES SPANIEL RESCUE 6000 HIGH BLUFF COURT RALEIGH, NC 27612	NONE	501(C)(3)	GENERAL PURPOSES	2,000
COLORADO HORSE RESCUE 10386 NORTH 65TH STREET LONGMONT, CO 80503	NONE	501(C)(3)	GENERAL PURPOSES	1,000
DAYS END FARM HORSE RESCUE 1372 WOODBINE ROAD WOODBINE, MD 21797	NONE	501(C)(3)	GENERAL PURPOSES	1,000
FRIENDS OF THE ANIMALS PO BOX 3937 MOORESVILLE, NC 28117	NONE	501(C)(3)	GENERAL PURPOSES	2,000
GUARDIANS OF RESCUE 34 EAST MAIN STREET SUITE 303 SMITHTOWN, NY 11787	NONE	501(C)(3)	GENERAL PURPOSES	2,000
HORSE RESCUE UNITED PO BOX 464 ALLENTOWN, NJ 08501	NONE	501(C)(3)	GENERAL PURPOSES	1,000
HUDSON RIVER SLOOP CLEARWATER 724 WOLCOTT AVENUE BEACON, NY 12508	NONE	501(C)(3)	GENERAL PURPOSES	1,000
Total . . . . ▶ **3a**				39,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
KILLINGWORTH LAND CONSERVATION PO BOX 825 KILLINGWORTH,CT 06419	NONE	501(C)(3)	GENERAL PURPOSES	1,000
LOUISIANA HORSE RESCUE ASSOCIATION 34 SUMMER DRIVE DILLSBURG,PA 17019	NONE	501(C)(3)	GENERAL PURPOSES	2,000
NOWZAD DOGS 100 WALNUT HILL UNIT 415 PEORIA,IL 61602	NONE	501(C)(3)	GENERAL PURPOSES	1,000
OCEANA 1350 CONNECTICUT AVENUE NW 5TH FLOOR WASHINGTON,DC 20036	NONE	501(C)(3)	GENERAL PURPOSES	1,000
PARTNERS FOR SUSTAINABLE POLLINATION 2777 YULUPA AVENUE 317 SANTA ROSA,CA 95405	NONE	501(C)(3)	GENERAL PURPOSES	2,000
SAVING AMERICA'S MUSTANGS 2683 VIA DE LA VALLE G313 DEL MAR,CA 92014	NONE	501(C)(3)	GENERAL PURPOSES	1,000
SHUG SLIGHTHOUND UNDERGROUND PO BOX 339 MCLEAN,VA 22101	NONE	501(C)(3)	GENERAL PURPOSES	1,000
US FRIENDS OF DAVID SHELDRICK 201 NORTH ILLINOIS STREET 16TH FLOOR INDIANAPOLIS,IN 46204	NONE	501(C)(3)	GENERAL PURPOSES	1,000
WILDLIFE HOSPITAL OF LOUISIANA SKIP BERTMAN DRIVE BATON ROUGE,LA 70803	NONE	501(C)(3)	GENERAL PURPOSES	2,000
WILDLIFE IN CRISIS PO BOX 1246 WESTON,CT 06883	NONE	501(C)(3)	GENERAL PURPOSES	2,000
WILDLIFE REHABILITATORS ASSOCIATION OF RHODE ISLAND 25 SHERMANTOWN ROAD SAUNDERSTOWN,RI 02874	NONE	501(C)(3)	GENERAL PURPOSES	2,000
WOODSTOCK FARM ANIMAL SANCTUARY 35 VAN WAGNER ROAD WILLOW,NY 12495	NONE	501(C)(3)	GENERAL PURPOSES	1,000
Total . . . . ▶ **3a**				39,000

TY 2013 Accounting Fees Schedule

Name: BURT FAMILY FOUNDATION INC

EIN: 30-0633793

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	4,100	0		0

TY 2013 Investments Corporate Stock Schedule

Name: BURT FAMILY FOUNDATION INC

EIN: 30-0633793

Name of Stock	End of Year Book Value	End of Year Fair Market Value
BNY MELLON	1,114,915	1,322,372

TY 2013 Other Professional Fees Schedule

Name: BURT FAMILY FOUNDATION INC

EIN: 30-0633793

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	9,358	0		0

TY 2013 Taxes Schedule

Name: BURT FAMILY FOUNDATION INC

EIN: 30-0633793

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	200	0		0
EXCISE TAX	289	0		0